

Using Trello to Manage Technical Services Work at NCSU Libraries

Tessa L.H. Minchew
Electronic Resources Librarian
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Trello in a Nutshell

- Cloud-based project management application
- “Freemium” business model with a very full-featured free level of access
- Based on kanban principles originally popularized by Toyota
- Boards > Lists > Cards
 - One or more boards can be created
 - Each board can have one or more lists
 - Each list can have one or more cards
 - Each card can contain multiple pieces of data

Trello Pros

- Free!
- Cloud-based, nothing has to be installed on the server
- Low barrier to entry, far less labor-intensive than wiki-based project management
- Highly collaborative, great for group work and project meetings
- Flexible & scalable, allows project tracking at many levels of detail
- Notifications for activity and due dates
- Keeps all stakeholders well-informed of project progress


Trello Cons

- Trello account required to view any board not made public
- Mixed buy-in could negatively impact success of board

NCSU Libraries Acquisitions & Discovery (AKA Two Great Departments in One)

- 7 librarians and 17 staff members divided into 3 units
 - Data Projects and Partnerships
 - Monographs
 - Serials
- Fully merged acquisitions & cataloging operations, responsible for all technical services functions at NCSU Libraries
- Multi-million dollar collections budget means lots of moving parts to track and heavy demands on the tools used to track them

Tracking Projects on Confluence



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Acquisitions and Discovery > Home > Acquisitions and Discovery Serials Unit > Serials Unit Projects > **Serials Unit Projects FY2012-13** View Edit Add Actions

Serials Unit Projects FY2012-13

Project Name	Priority	Status	Lead	Other staff	Details
856 Clean-up project	1	TBD	KW		
Accelerated spending FY12	1	Done	KW, BG	Serials Unit	BG following up on stragglers
Access verification training	1	Done	CH	serials unit	cross-training for serials catalogers
Address changes for Hunt	1	Done	BG	Serials Unit	staff will handle stragglers as they arise
Annual Appraisals	1	Done	CH, KW	serials unit	
BG Retirement planning	1	Done	KW	BG, CH	
Cat Core Cross-training	1	Begin late summer	TM	Department	
CH Maternity Leave Planning	1	Done	KW	CH, MC	
Claims training	1	Summer	KW, DS	BK, BW, new advanced	
Confirm all subscriptions with Addie and update fund codes	1	Done	CH		
Confluence migration	1	In progress	CH	RG, BW, KP, MH, AB	Completing page inventory
Create Child ordertype in Sirsi	3	Summer	KW	CH	implement during order clean-up

Let the Live Demo Begin!

<https://trello.com/>

Questions?

Tessa Minchew

919-515-5182

tminche@ncsu.edu

Teddy Gray

919-660-5971

teddy.gray@duke.edu